

South Korea & Japan Market Report



Visit to South Korea & Japan, February 2006

Purpose of Visit:

- To attend ELT & FE Mission, Seoul, 10th-12th February
- To make presentations and briefings to agents
- To meet with Embassy & British Council staff

South Korea

Key Facts

Population	48.5 million
Capital	Seoul (10.2m); other major cities: Busan (3.6m), Daegu (2.5m), Incheon (2.2)
Language	Korean
GDP per capita	\$20,300
Currency	Won

ELT & FE Mission, Seoul

Background

This was the first fair of its kind with the aim of promoting specifically vocational and ELT courses in the UK. The British Council holds an Education UK Fair in Korea every October which focuses more on higher education. Feedback from students attending this event was that further information regarding English language courses and vocational education offered by FE institutions would be appreciated. The British Council responded by organising an event to cater specifically for this interest.

Exhibition overview

The event began with a mini workshop for which institutions had been able to schedule appointments with agents in advance. This was intended by the British Council to help make the event more cost effective for all, but especially for private sector organisations not eligible for the Education UK Partnership discount. Feedback from institutions seemed to be that this

was useful, however, due to a smaller number of agents than educators at the event, appointments were made on a first come, first served basis; this meant that many missed out on appointments altogether.

At the fair itself both agents and educators were at tables to receive enquiries from students. The British Council reports that 1,224 students attended in total, with Sunday being slightly less busy due to the number of Koreans now attending church and setting the day aside for family.

Those making enquiries with English UK were mainly young adults looking for long-term English language courses of six months or more. The trend was for general English taken with other subjects such as music as a means of keeping interest up over a long period of study.

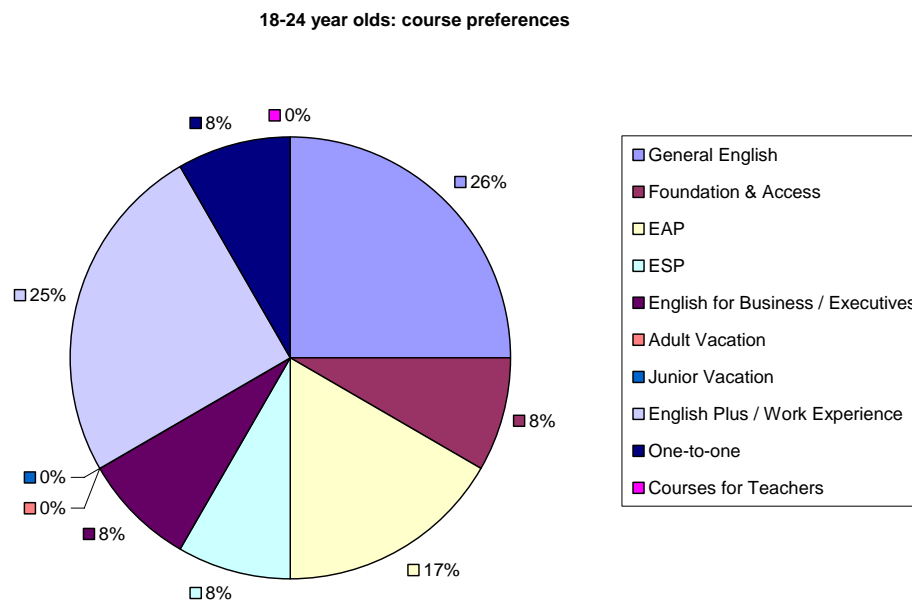
There was on the whole a steady stream of visitors, with students spending on average a good 15-20 minutes asking questions and receiving counselling. The majority did not have fixed ideas about what they wanted, but seemed rather to want information on what was available and what the possibilities might be.

Visitor profiles and enquiries

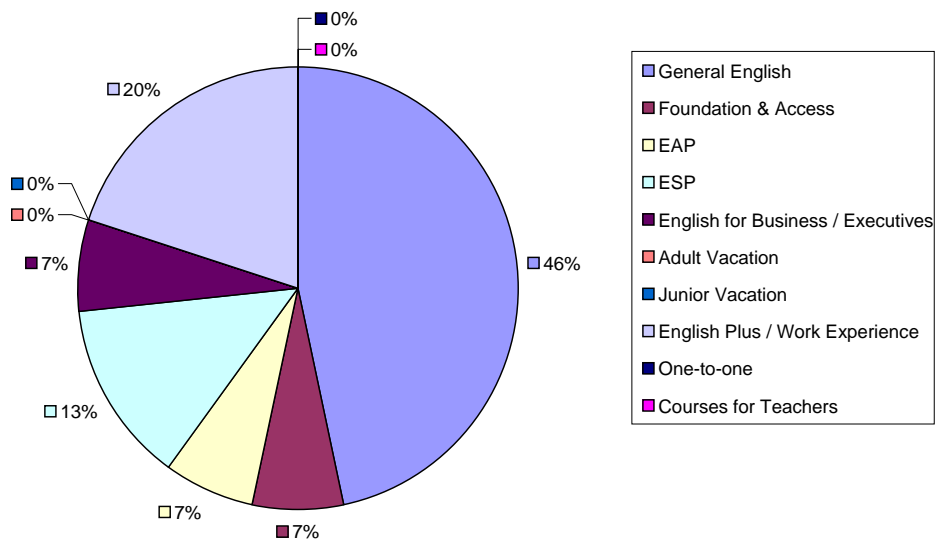
English UK asked all enquirers visiting the table to complete a brief questionnaire to provide a snapshot of the market. Just over half were in the 25-35 age group, closely followed by those in the 18-24 category who made up almost 40% of enquiries. Only one visitor put themselves in the 36-45 age bracket and there were no enquiries from those over 45 or aged 17 and under, though a couple of enquiries came from parents seeking courses for their children, both of which fell between ages 11 and 15.

The pre-event information from the British Council suggested that the presence of junior course providers would be promoted, however, feedback from those providers at the event and visitors to the table suggested that this activity may have been somewhat lacking. Nevertheless, English UK statistics and general information from agents indicates that Korea is not a huge market where juniors are concerned.

A break-down of course preferences by the main age groups enquiring can be seen in the charts below.



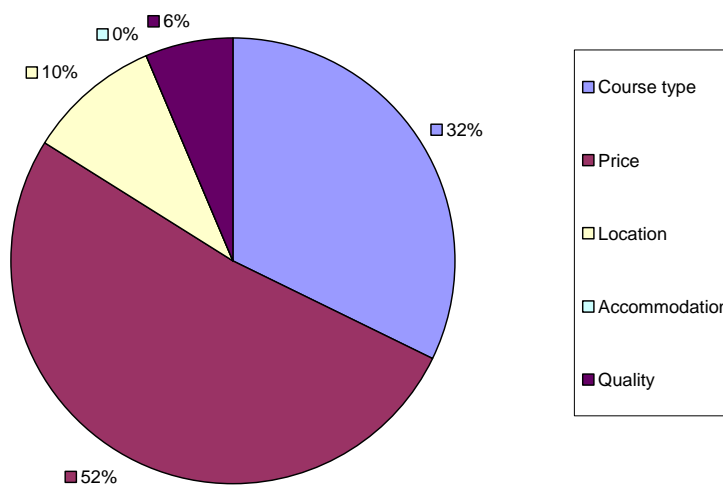
25-35 year olds: course preferences



The vast majority of students were interested in general English courses, with those in the 18-24 group often asking about English plus other subjects such as floristry through to cooking. The overwhelming trend among both age categories was for long-term English courses ranging from 6 months to one year. Students were serious about finding as much information as possible and were keen to receive advice about the options open to them, rather than just picking up brochures.

As is often the case, the vast majority rated price as the most important consideration when choosing to study abroad. As most preferred general English over anything else, less consideration seemed to be given to the course type as long as centres could cater for their hobbies and other interests.

What is most important when choosing a course?



Nobody rated accommodation as being a major factor in the decision making process, and most (where they did not have plans to stay with friends) were happy to be advised as to the various benefits of the different accommodation types. Nevertheless, many had heard other students tell of problems with host families (usually in Canada) where there were difficulties if students did not get on with them and wished to move, or where the hosts were not suitable matches. In these cases, students simply wished to have their minds put at rest rather than being totally against homestay, and the cultural and language benefits helped to outweigh any negative preconceptions.

Other trends and anecdotal evidence

Many of those spoken to expressed a preference for London, partly due to there being a comparatively small but established Korean population there, but also due to the assumption that there is no particular regional accent in London. Even of those who were happy to study elsewhere, many wanted to be where “the regional accent is not so strong” as they supposed they would have difficulty in understanding what was being said. My translator, who had lived in Belfast, Birmingham and Yorkshire, proved very helpful!

The Market

Korea has a student population of over 7m, with 40% of these based in Seoul and the surrounding area. The Korean Ministry of Education put the number of students going to the UK for study in 2004 at 18,600¹ and 15,000 of these undertook English language courses. A high proportion of English language students go on to further or higher education once in the UK.

The Ministry of Education has placed English language learning high on the agenda; English is now being taught in the first year of primary school and this should be nationwide by 2008, with at least one native speaker to be in every middle school by 2010.

The majority of young Koreans are willing to spend a year abroad for foreign language study, though of course parents usually foot the bill. Two years' military service becomes compulsory for men in Korea at the age of 19 but can be postponed up until the age of 30 to make way for study. Often young men study at university for a couple of years, followed by military service when they are 20 or 21; the trend is then to study abroad for a year before going back to university to finish their studies in Korea. The US army still has a presence in Korea, and many young men try to do their service with them due to the language benefits and because it is an advantage on their C.V.

Competition for jobs is very high and there is a feeling that as many qualifications as possible are needed to gain good employment. Since most young Koreans are university educated, Korean degrees have been devalued somewhat, unless from a top university, for which competition is again very high. Post-graduate qualifications are therefore also popular with an English qualification being seen as essential to apply for any job.

The most popular English qualifications are TOEIC and TOEFL, especially TOEIC because it is cheaper, and are taken before and after overseas study. Many Koreans are less confident in their speaking skills and are therefore keen to take the computer-based test before the introduction of the internet-based test in order to avoid the speaking element.

Those who cannot afford to do an English language course abroad stay in Korea and study at one of the thousands of private language schools in the country and “English villages” in the Seoul area. Amongst the most popular are YBM, where students can take the TOEIC, and the Graduate School of International Studies, where all classes are taught in English. A great number of teachers are American Koreans.

¹ NB the Korean Ministry of Justice puts the figure at 17,109

Competition

The main competitor for the UK generally is the USA, since there is a high recognition of degrees from US universities, as well as there being an established Korean community there. Canada is also popular for this reason, and in addition it is considered to be a “safe USA.” Although the process and preparation for UK study is considered easier than America, it loses out to countries such as Australia and New Zealand, where lower tuition fees, cheaper living costs and the safe environment make them attractive destinations.

Nevertheless, it is increasingly fashionable to study in the UK particularly due to the perception of high quality provision being on offer as well as being the home of the English language. The Korean population in the UK also now stands at around 30,000 so there is an increasingly good support network. Additional benefits include experiencing cultural diversity and the opportunity for European travel. Those returning from study in the UK are now being viewed more positively than those returning from the US.

Regarding UK study generally, and particularly going on to FE and HE, there is a feeling among Koreans that although the UK is very expensive, the quality of provision and the competitive advantage it lends in the job market, tend to outweigh the cost.

Overall, it appears that the UK has greater potential to increase its share of the Korean market than its competitors do.

Economy

Prior to 1997 the Korean economy had expanded rapidly over some decades and the country was a front runner among the newly industrialising economies. However, the 1997 crash plunged the country into a currency crisis and the economy faced severe difficulties.

Since then the government has been committed to thoroughgoing structural reforms and though there is continuous improvement, economic recovery has been slow.

Indicators are currently positive however delicately balanced the situation appears to be. Continued growth in China is boosting the Korean exports economy and the domestic economy has been showing signs of mild recovery.

Expectations for 2006 are that unemployment will continue to gradually fall from 3.8% in 2005 to 3.6%, helping to safeguard domestic consumption. Modest economic growth overall is also predicted with the percentage expected to be around 5% for 2006 compared to 3% in 2005; again this is as domestic demand recovers and export growth remains stable.

Information sources for students

Korea is an extremely internet driven society, with every visitor to the stand able to provide an email address on the questionnaire. Research by the British Council showed that 64% of the students surveyed listed the internet as their first source of information. When asked to list their critical sources of information, the results were as follows:

Internet:		41%
Agent:		28%
Friend & senior:		19%
Magazine:		11%
Other:		1%

Word of mouth and recommendations from previous students also plays a huge role, and this was noticeable in the number of students seeking reassurance about homestay accommodation following feedback from peers.

Visas

Angela Trott (Second Secretary, Consular/Management) and Marie Tomlinson (Third Secretary, Immigration) both attended a British Council briefing at the start of the mission to give a presentation on the current visa situation in Korea, which included answers to some questions posed by English UK in advance of the mission.

Visa applications are on the up from Korean students, with the Embassy seeing a 20% increase each year. Only those wishing to study in the UK for more than 6 months require a visa, and they may apply up to 3 months in advance, with the option of postal applications removing the need to visit the Embassy.

Short-course students do not need entry clearance prior to departure however they should be able to give the exact dates of their course as well as produce their acceptance letter when entering the country at a UK port.

The Embassy is keen to encourage long-term students to apply earlier to avoid the rush during the summer months and for this reason asks UK institutions and agents to advise them to apply as soon as they have their acceptance letter. ECOs often see letters with insufficient information and so advise that these should include the following:

- Applicant's name
- Date of birth (to distinguish between applicants with the same name)
- The name of the course they are going on
- The cost of the course (the invoice is sufficient evidence for the student to provide)
- Whether the fees have been paid (so that ECOs know why the bank account being used shows a sudden drop in available funds)
- Course start and finish dates (these must be exact for the terms of the visa)

The most popular time of year for visa applications is from April through to September, and ELT related courses are by far the most popular. During the busy period, around 200 people may visit the Embassy each day. For this reason, postal applications and drop-boxes were introduced. In addition, British Council trained agents may drop applications in.

Basic information requested for applications is:

- The acceptance letter
- Proof of available funds
- Proof of payment (if fees have been paid already)
- Details of their educational background or current study choices
- 6 months' bank statements

Previously, 3 months' bank statements were required, however those who can provide 6 are not requested to attend an interview.

The Embassy in Korea is happy for students to use their permitted 20 hours' work per week to earn some pocket money and students who suggest that they will be doing this when they apply are not normally penalised. However, this should not be used as a means for supporting themselves fully and any student reported for not attending classes and working full-time would not be granted a visa in the future.

Korean students are not considered to be an immigration risk as they generally comply with the terms of their visa. Refusal rates for the period 2004-05 stood at 2.3%.

The standard of applications is found to vary though refusals are relatively rare. Those who have not supplied the correct documentation the first time round may re-apply, however they must pay the full application fee again. In some cases where applications have been refused, ECOs have found that students have lied about who will be paying for what aspects of their stay as they worry about the costs. The Embassy accepts that funds may be coming from

different sources and students should be honest about these sources. The suggested amount needed for one year's stay in the UK, after fees have been paid, is £7,500.

Some comments and questions were raised regarding refusals by delegates. Since being posted to Seoul (Spring 2005) Angela Trott has reviewed refusals so that no (Korean) application should be refused on the grounds of a student having either too much or too little English. She also reiterated that the reason of the course being available in the student's home country for less must be used in conjunction with other reasons, not as a stand alone.

The majority (70-80%) of students apply through agents. Nevertheless, students are advised to check official websites for the most up-to-date information regarding the application process and requirements. The Embassy has found that rumours are rife among agents and those with an axe to grind do not always tell the truth to students, who believe them. The best points of reference are: www.britishembassy.or.kr, www.uk.or.kr or they can email using visamail.seoul@fco.gov.uk.

Angela and Marie were keen to stress that they are happy to receive feedback from students regarding the application process and the standard of service they have received in order to make improvements.

The British Council & Agents

The only British Council office in Korea is in Seoul where the teaching centre is also based. Due to the internet driven nature of Korean society, one of the main thrusts of the Council's promotional work is online.

The Education UK Cyber Club (<http://EduUKClub.EducationUK.or.kr>) is a site for Korean students which they can subscribe to and receive newsletters from via email. The site contains interest stories about studying in the UK usually written by alumni from UK institutions in order to promote their experiences of UK education among their peers. In addition, English language centres are able to sign up to a scheme whereby they sponsor a four week (minimum) course for a student. The student then writes an article regarding their time at the centre, which appears on the website along with the centre's logo. The BC feels this is a useful form of promotion as it combines the internet marketing and word of mouth recommendations so important to Koreans.

As well as organising this event, the BC have also responded to feedback regarding a desire for more information on ELT and FE by organising a mission for agents covering these areas, which took place in February. The Council tries to organise a mission to the UK for agents each year and English UK is currently looking into this as a prospect for next spring. In addition, the Council conducted some basic research into the FE market in Korea in 2004 and is therefore now to undertake a follow up for spring 2006. In their briefing, the BC made some initial recommendations from this, some of which are rather obvious but which could be applied to the ELT sector generally. These included:

- Enhancing internet marketing
- Making visits to Korea
- Building up good contacts and making use of agents
- Understanding the importance of word of mouth
- Ensuring promotional material is translated into Korean.

In April 2005 the British Council in Korea introduced their UK Education specialist agent scheme providing training to interested agents. The training takes place on two days, and is followed by a qualification test. It covers UK secondary, UG, PG, FE sectors, IELTS and customer care service, and is given by both British Council staff and external trainers. Further details of this as well as a list of the 21 agents who have completed the training can be found at <http://www.britishcouncil.org/korea-educationuk-agent.htm>.

English UK provided a briefing session for agents at the start of the mission, which was attended by 26 agents, 15 of which also participated in the fair. This covered the most up to date information on developments within English UK and our work with agents and partners, as well as a visa update. The intention was also to gather some useful information on agents' views of the market, though fierce competition between agencies in Korea meant information was not always very forthcoming. Of those who were willing to give some response, each listed the USA and Canada as the most popular choices for clients, though the UK was on the increase.

As borne out by the snapshot questionnaire, the average length of stay for clients was reported as 9 months with the average client age falling between 19 and 28. Demand is highest for general English, which agents put at about 50%, with requests for with exam preparation also; demand for English Plus courses was estimated to be at around 20%, as was that for work experience, with foundation course requests representing about 10% of business.

The visa process was generally viewed by agents to be relatively simple and on the whole much easier than obtaining one for the US. Nevertheless, one or two agents did express concern at the recently introduced requirement to include six months' bank statements rather than three.

Finally, attitudes of clients to the UK are reported to lean towards the side of it being too expensive, however some are beginning to feel that the reputation for quality off-sets this concern.

SWOT Analysis

<p>Strengths</p> <ul style="list-style-type: none"> • Demand for qualifications, especially English • Established trend for overseas study • Good links between British Council and agents • Low risk, high value students 	<p>Weaknesses</p> <ul style="list-style-type: none"> • UK seen as too expensive for many • Attitudes to regional accents may disadvantage some providers • Economic situation remains relatively fragile
<p>Opportunities</p> <ul style="list-style-type: none"> • Changing attitudes toward UK education • Demand from companies for well-educated English speakers • Internet driven society 	<p>Threats</p> <ul style="list-style-type: none"> • Main preference for USA & Canada before UK • Thousands of ELT providers in-country

Overall, there is a great deal of potential for the UK to increase market share from Korea compared with competitors. Although the US remains the most popular choice for Koreans, a shift appears to be taking place in terms of the way the UK is viewed. As an increasingly fashionable destination for high-value, low-risk students, UK institutions are in a position to take advantage of the situation. The level of competition for jobs means that qualifications which can provide a competitive advantage will always be desirable especially English. Nevertheless, the delicate economic situation is something which could affect the demand for an overseas education should things take a turn for the worse.

Agent	Address	Tel	Fax	Email
BCM International Exchange Association, Ltd.	7th Fl., Dongil B/D, 1305-7, Seocho-Dong, Seocho-Gu, Seoul, 137-070, Korea	02) 5678340	02) 5528205	info@bcmuhak.co.kr
Dong Suh Education Centre	#910 Doosan Bearstel, 1319-11 Seocho-dong, Seocho-ku, Seoul Korea	02) 588 3558	02) 588 3379	es@dongsuhuhak.com
Esther Education Center	Suite 701, Gyewon Bldg., 32-7, Gwancheol-dong, Jongro-gu, Seoul 110-111, Korea	02) 735 0661	02) 720 7857	info@studyinuk.co.kr
GEOS International Korea	3F, Central B/D, 10-1, Myungdong 1-ga, Joong-gu, Seoul, Korea	02) 534 3118	02) 534 3161	korea@geoschool.com
Global Alliance Inc.	#401 Hansung Building. 1306-3 Seocho-dong, Seocho-gu, 137-855, Korea	02) 777-8899	02) 3477 8558	together@global.net
Hana Education Centre	5F Sekyung Bldg., Yeoksam-dong 819-10 Kangnam-gu, Seoul, Korea	02) 566 5757	02) 566 5763	hana@hana-edu.co.kr
iAE Edu Net, EduHouse Inc.(Shinchon)	4F, 18-9 Changcheon-dong, Seodaemoon-ku, Seoul 120-833, Korea	02) 362 8880	02) 362 9996	yklee@eduhouse.net
ISEP KOREA CO., LTD.	Suite 1703 Kyobo Bldg., Jongno-1ga, Jongno-gu, Seoul, 110-714, Korea	02) 735 1155	02) 735 1156	isep@isep.co.kr
Londonuhak (EDMEDU Ltd.)	2F Handuk B/D 649-4 Yeoksamdong Gangnamgu Seoul, 135-080, Korea	02) 562 5091	02) 562 2790	admin@londonuhak.com
Myung Moon Overseas Educational Institute	#302 Daejun B/D, #1318-5 Seocho-dong, Seocho-gu, Seoul 137-070, Korea	02) 3478 5900	02) 3478 0177	uhakguide@kornet.net
School Guide LTD.	#1202 Gyewon Building, 32-7 Kwanchul-dong, Jongro-gu, Seoul, Korea	02) 738 1723	02) 738 1724	master@schoolguide.co.kr
TOP Educational Counselling House	Suite RM # 702 Dongchul BLDG., 12-13 Kwanchul-Dong, Jongro-Gu, Seoul, Korea	02) 722 4056~7	02) 722 4058	topeducation@hotmail.com
Top World Agency	#305 Halla Classic Building, 824-11, Yeoksam-dong, Kangnam-gu, Seoul 135-080	02) 501 6696	02) 501 6602	agency@gotwa.co.kr
Uhak.com	5th fl. Gaewon B/D 32-7 Kwanchul-dong Jongro-ku Seoul Korea 110-111	02) 722 3000	02) 733 0599	biz@uhak.com

UKEO KOREA Ltd.	#1401 LG Palace Building, 165-8 Dongkyo-Dong, Mapo-Ku, Seoul, 121-754, Korea	02) 3143 0252	02) 3143 0403	seoul@ukeducation.co.kr
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World Overseas Education Center	#601 Kyewon B/D, 32-7 Kwanchul-dong, Jongro-gu, Seoul (Jongro Center)	02) 737 3009	02) 737 3010	tiffany@studyabroad.co.kr
YBM/Sisa Overseas Education Services	1F, 56-15 Chongno-2ga, Chongno-gu, Seoul 110-122, Korea	02) 2273 9671	02) 2273 9675	ybmuhak@ybmsisa.com

Japan

Key Facts

Population	128 million
Capital	Tokyo (12.4m); other major cities: Yokohama (3.5m), Osaka (2.6m), Nagoya (2.2)
Language	Japanese
GDP per capita	\$30,400
Currency	Yen

Market Overview

Due to the close proximity to Korea, a brief visit was made to Japan, visiting Tokyo and Osaka in order to meet with British Council staff and make presentations to agents. In addition, a brief visit was made to the Embassy.

Economic situation

After a prolonged stagnation during the 1990s, the Japanese economy began to show signs of recovery in 2003. Though still feeling the effects of the bursting of the economic bubble in the 1980s, Japan remains a major economic power. 2003 and 2004 saw growth improve, being at 2.7% and 3.4% respectively.

Unemployment, especially among the young has been a major issue, with the employment rate of new graduates at 55.8% in 2004. Nevertheless, 2005 saw significant improvements as companies resumed hiring new graduates. The overall unemployment rate is gradually falling and has recently dropped to 4.1%, the lowest rate since 1998. In turn, this appears to be pushing up prices and improving the domestic economy, while demand from China and other Asian countries has vastly improved Japan's export economy.

ELT and in-country provision

Increasing the number of Japanese who can use English has been recognised as holding importance for the recovery of the Japanese economy. To this end the government introduced plans to make it easier for English to be taught in more innovative ways in school as well as to increase the number of native English assistant teachers in schools.

Formal English language teaching in Japan starts at age 12 however, there is reported to be a growing trend in pre-school tuition with parents concerned that their children have all of the necessary skills to gain a good job. According to a recent article in the *Guardian Weekly* 14% of Japanese households with pre-school children sent them to English lessons, with an estimated 21% of five year olds also taking classes (as compared with 6% in 2000). Despite calls from the education minister to make English language learning compulsory in primary schools, only 36% of teachers from a survey were found to be in favour, compared with 70% of parents. The alternative is therefore unregulated private language schools.

There are many private English schools in Japan with some undertaking very aggressive and successful marketing. The average cost for one lesson is estimated to be in the region of 3,000 – 5,000 yen (£15 - 25). Some students purchase a certain number of session units and in many cases simply attend classes when possible (no fixed day for classes) and this is very popular with busy working people. Some schools provide video conference classes 24 hours a day, and in addition they sell video conference kit, which can be installed in the student's home.

The British Council also has teaching centres in Tokyo and Osaka, with 4,000 and 2,000 students per year attending each centre respectively. The vast majority attend general English classes, with the average cost for a course being 80,000 yen or £400. The majority of BC students are aged between 25 and 35.

No placement service is offered though students are recommended to those agents who have completed the British Council training.

Agents & the British Council

Somewhere between 500 and 600 agencies are estimated to be operating in Japan, with around 200 of these known to the British Council. BC Japan offers a formalised agent training programme, on conclusion of which agents receive the British Council Certificate in Promoting UK Education & Training. This appears to be taken seriously by those agents who have completed it and they are keen to display the fact on their business cards. Currently 60 agents have completed the training and these were invited to attend briefings by English UK in Tokyo and Osaka. A list of those in attendance can be found at the end of this report.

The feedback from agents in both locations was very similar in that the average student age is around 25 with the majority preferring to take long-term courses of 6-12 months. The preferred market for clients varied from agent to agent, however many reported Canada as being the flavour of the month and that the US has been experiencing a resurgence lately. Whilst there is a steady demand for General English, English Plus and university preparation, most agents recorded an increasing interest for work experience courses and the working holiday. The USA has recently introduced a working holiday visa and the ease of working in Australia means that it continues to be a popular destination with Japanese students. Whilst the UK does have a working holiday scheme, Japanese students are not eligible.

In terms of clients' views of the UK, agents reported the culture as being one of the most attractive qualities for students, mostly conjuring up images of traditional clichés such as Scottish tartan and Big Ben, though mingled with a fashionable and modern image for London. Whilst there appears to be respect for British English, the prevalence of American English and culture in Japan makes the US a more dominant force. Though undoubtedly recognised as having a reputation for high quality, the UK is often still viewed as too expensive for some Japanese.

The British Council holds regular Education UK events throughout the year in Japan, with British institutions being able to join the April and October events. The 2006 dates for these are:

Education UK Days	Tokyo 8 th April Osaka – 9 th April
Education UK Exhibitions	Osaka – 9 th October Tokyo – 14 th & 15 th October

Contact Toshie Hidaka in Tokyo (Toshie.hidaka@britishcouncil.or.jp) and Azusa Tanaka in Osaka (azusa.tanaka@britishcouncil.or.jp).

Visas

Meeting with Edward McEvoy, First Secretary, HM Consul

In line with the relatively recent changes to the immigration rules, only those students wishing to come to the UK for more than 6 months are required to apply for leave to enter. The change in rules meant that the number of applications received went from 2,784 in the period 2003/04 to 9,044 in 2004/05. Japanese are not considered to be high risk and there are very few issues surrounding student applications. This is reflected in the refusal rate which stood at 0.8% for the 2004/05 period, despite the increase in applications, compared with 1.4% in 2003/04.

On the rare occasion that a refusal is issued, this normally arises because the applicant has been to the UK before and fallen foul of the immigration rules. In this instance they are unlikely to get entry clearance in the future.

The majority of applications are postal, with probably half of all students going through agents. Mr McEvoy reported that approximately three quarters of applications are from female students, who after 3-4 years' study in the UK then put down roots and are reluctant to return to Japan. There are currently around 60,000 Japanese living in the UK.

The main application requirements are simply a letter showing a confirmed offer and evidence of funds. The Embassy is not too prescriptive in terms of banks statements and undertakes to be fairly flexible, similar to Korea with the 20 hours' work per week rule and earning a bit of extra pocket money.

Summary

The decline or growth of the Japanese economy does not seem to have had a huge effect on the study travel market there. Student week figures collected by English UK from private sector members have shown a slight decline in numbers to the UK in the past couple of years (13.27% in 2003, 11.87% in 2004) despite the economic situation in Japan now improving. This is likely to be due to countries such as Canada and the USA increasing in popularity.

Government efforts to increase the level of English competence through mainstream education have had a mixed reception from parents and teachers with the result that there appears to be a heavy reliance on unregulated language schools of varying quality.

The message from agents was mixed, with some reporting an increase in numbers sent to the UK and others a decline, in favour of the US and Canada. Despite students often coming into offices with a preference for North America and preconceived ideas about the UK, agents said that after spending some time with students they were able to persuade them away from the traditional views of poor food and bad weather. Nevertheless there was strong feeling that the UK was likely to miss out due to the comparatively limited working opportunities for students.

Agency	Contact	Email
Aimsmart Consulting	Tami Tsurumaki	
ALC-Global Partners Education Network	Masaki Tani	tani@gp21.jp
	Shizuka Saiki	saiki@alc-gp.jp
Britain Reservation Centre	Toyo Keiyama	tony@jp.on.com
British Education Office	Yuko Okado	okado@beo.jp
Council on International Educational Exchange (CIEE)	Tomoko Nakano	tnakano@cieej.or.jp
Gio Club Study Abroad	Yuki Ozasa	ozasa-y@arukikata.jp
Global Study	Yoshikazu Ueoku	ueoku@global-studu.jp
Intact Educational Systems	Akiko Hida	
JTB Global Club	Akiko Oishi	oishi666@west.jtbglobal.co.jp
Kings World Studies	Michio Ochi	
Mainichi Communications Inc.	Mari Tanaka	matanaka@mycom.co.jp
Minpo Foreign Studies	Yukari Shinkai	yukari@minpo.co.jp
Network Communications	Masakazu Sakata	netcom@attglobal.net
Ryugaku Journal Inc.	Miki Harada	harada@ryugaku.co.jp
	Yoshiko Fujinobe	fujinobe@ryugaku.co.jp
Study Group	John Crick	jcrick@studygroup.com
UTS Centre for International Education	Kenichi Ikeno	info@uts-japan.co.jp